

Include Leveraging Diversity Specific Measure

The Leading People critical element and the Leveraging Diversity specific measure must be included in your supervisory performance plan.

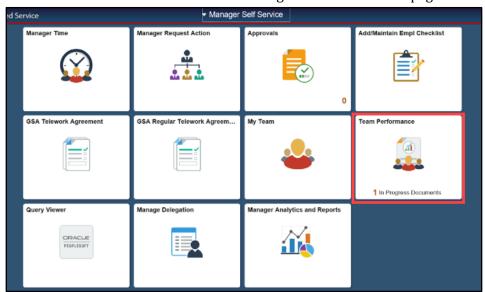
Add Leading People critical element to NEW performance plan: Choose this option if you are creating a **new** performance plan and not cloning a past performance plan.

<u>Clone prior performance plan with Leading People critical element</u>: Choose this option if you are cloning a prior performance plan that <u>already included</u> the Leading People critical element.

<u>Clone prior performance plan without Leading People critical element</u>: Choose this option if you are cloning a prior performance plan that did <u>not</u> include the Leading People critical element.

Add Leading People critical element to NEW performance plan

1. Select the **Team Performance** tile on the Manager Self Service homepage.



2. From the **Current Documents** screen, select the **Create Documents** button.

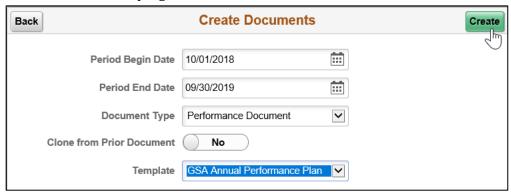


3. A **Person Selector** dialogue box will appear. Select the employee for whom you would like to create the performance plan, and select the **Continue** button.

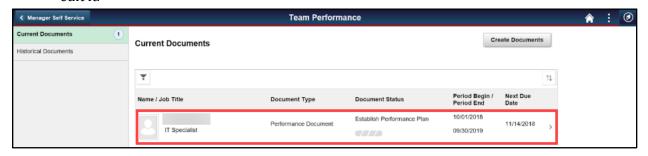




- 4. In the *Create Documents* dialogue box, enter or click the calendar icon to select the **Period Begin Date** and the **Period End Date** for the performance document.
- 5. Choose **Performance Document** from the *Document Type* drop-down menu.
- 6. Set the *Clone from Prior Document* field to **No** to create a **new** performance plan.
- 7. Select **GSA Annual Performance Plan** from the *Template* drop-down menu, and select the **Create** button at the top right to continue.

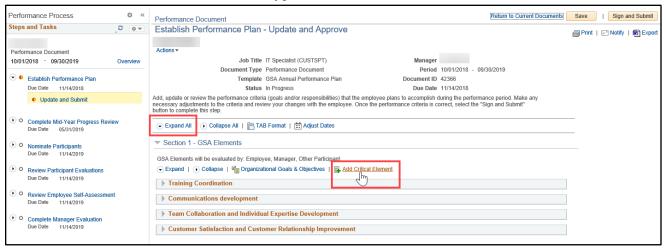


8. The newly created performance document will appear. Select the document to open and edit it.

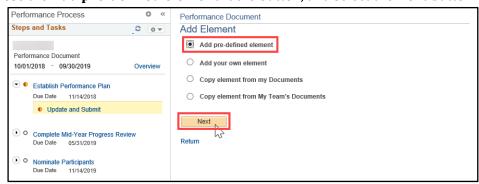




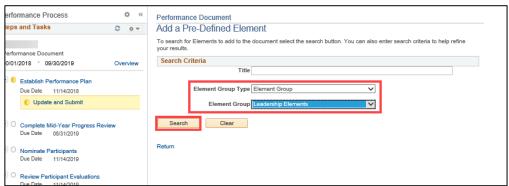
- 9. On the *Establish Performance Plan* page, select the **Expand All** option to review all sections of the performance plan.
- 10. Choose the **Add Critical Element** hyperlink under the **GSA Elements** section.



11. Choose the **Add pre-defined element** radio button, and select the **Next** button.

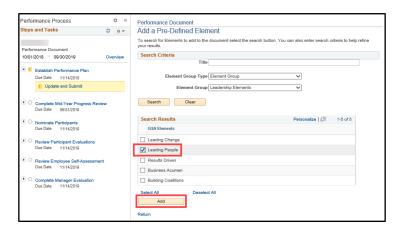


- 12. On the **Add a Pre-Defined Element** screen, choose **Element Group** from the Element Group Type drop-down menu and **Leadership Elements** from the Element Group drop-down menu.
- 13. Select the **Search** button.

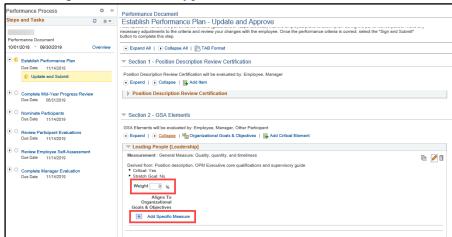


14. From the Search Results, select the checkbox by **Leading People**, and choose the **Add** button to continue.

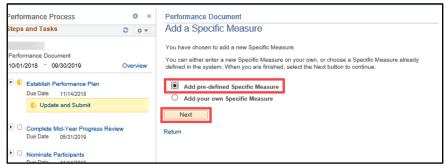




- 15. Under the Leading People [Leadership] section, indicate the percentage this specific measure will be weighted in the **Weight** field.
- 16. Select the Add Specific Measure hyperlink.



17. On the Add a Specific Measure screen, select the radio button **Add pre-defined Specific Measure**, and choose the **Next** button.

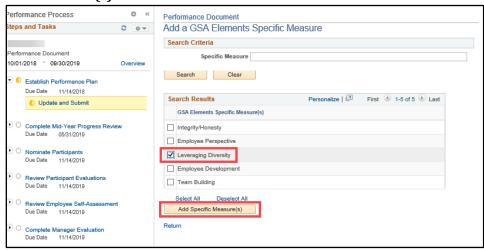


18. On the Add a GSA Elements Specific Measure screen, leave the Specific Measure field blank, and select the **Search** button.

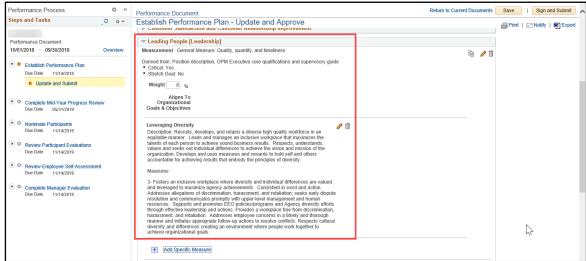




19. From the Search Results, select the checkbox by **Leveraging Diversity**, and choose the **Add Specific Measure(s)** button to continue.

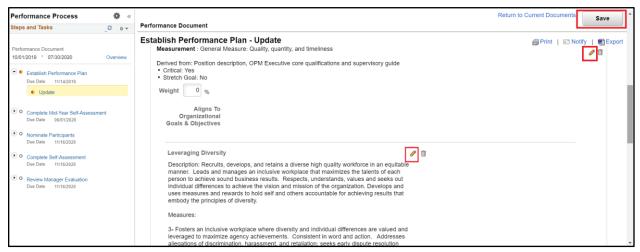


20. The **Leveraging Diversity** specific measure will appear under the **Leading People** [Leadership] section.

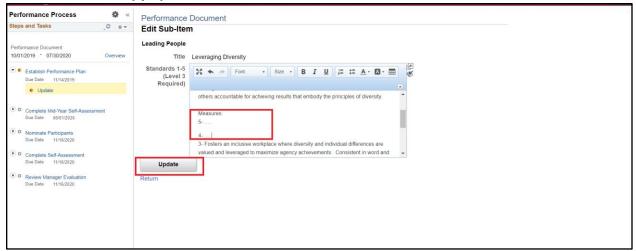


21. To edit the **Leading People** critical element or the **Leveraging Diversity** specific measure, click on the pencil icon.

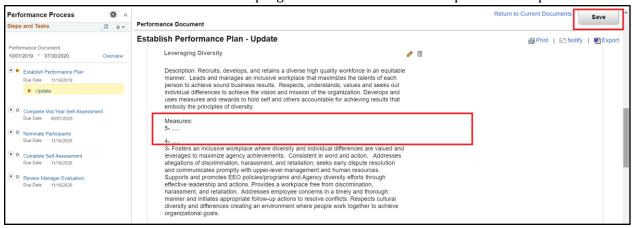




22. Edit the **Leading People** critical element or the **Leveraging Diversity** specific measure and click **Update**. *Note:* By editing the **Leveraging Diversity** specific measure you can now add other levels of performance.



23. Choose the **Save** button at the top right of the screen to save the performance plan.



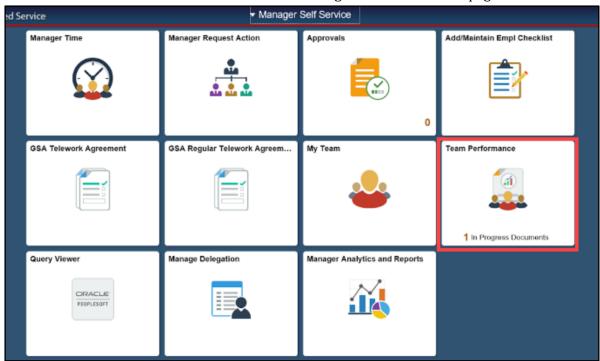


24. Choose the **Save** button at the top right of the screen to save the performance plan. **You** have successfully added the mandatory Leading People Critical Element and Leveraging Diversity Specific Measure to the performance plan.



Cloning prior performance plan with Leading People critical element

1. Select the **Team Performance** tile on the Manager Self Service homepage.

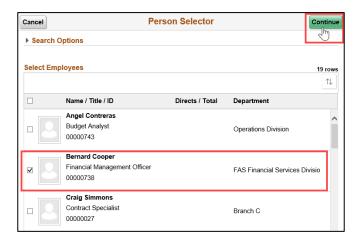


2. From the **Current Documents** screen, select the **Create Documents** button.

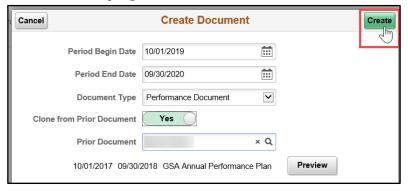


3. A **Person Selector** dialogue box will appear. Select the employee for whom you would like to create the performance plan, and select the **Continue** button.





- 4. In the *Create Documents* dialogue box, enter or click the calendar icon to select the **Period Begin Date** and the **Period End Date** for the performance document.
- 5. Choose **Performance Document** from the *Document Type* drop-down menu.
- 6. Select **Yes** from the *Clone from Prior Document* field to create a new performance plan that **already includes** the Leading People critical element.
- 7. Select the magnifying glass to the right of the *Prior Document* field, and choose the past performance plan you would like to clone from those listed. The employee's name will populate the **Prior Document** field, and details of the plan will appear just below. Select the **Create** button at the top right to continue.



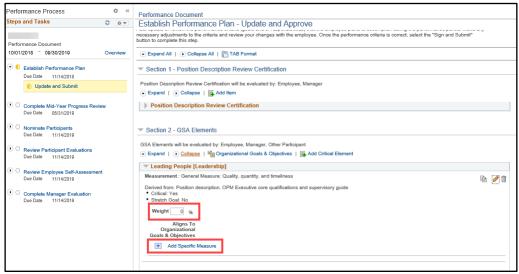
8. The newly created performance document will appear. Select the document to open and edit it.



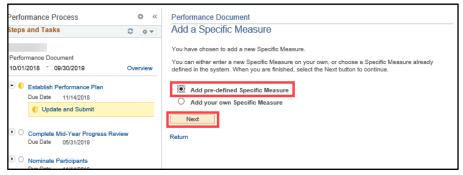
- 9. On the Establish Performance Plan page, select the Expand All option to review all sections of the performance plan.
- 10. Under the Leading People [Leadership] section, update the percentage this specific measure will be weighted in the **Weight** field.



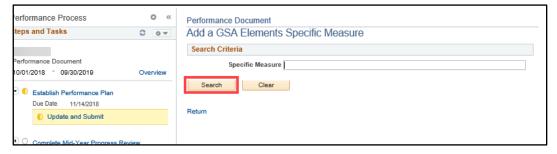
11. Select the **Add Specific Measure** hyperlink.



12. On the Add a Specific Measure screen, select the radio button **Add pre-defined Specific Measure**, and choose the **Next** button.

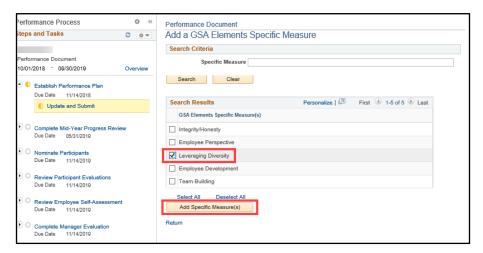


13. On the *Add a GSA Elements Specific Measure* screen, leave the **Specific Measure field blank**, and select the **Search** button.

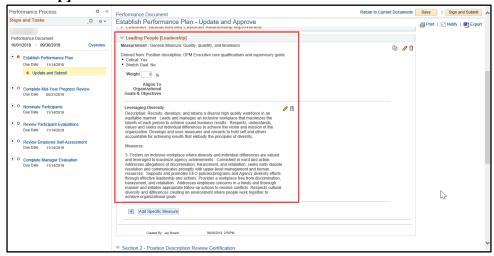


14. From the Search Results, select the checkbox by **Leveraging Diversity**, and choose the **Add Specific Measure(s)** button to continue.

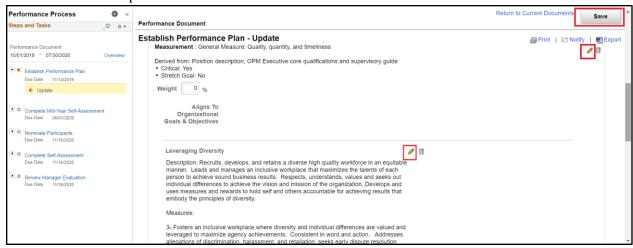




15. The **Leveraging Diversity** specific measure will appear under the **Leading People** [Leadership] section.

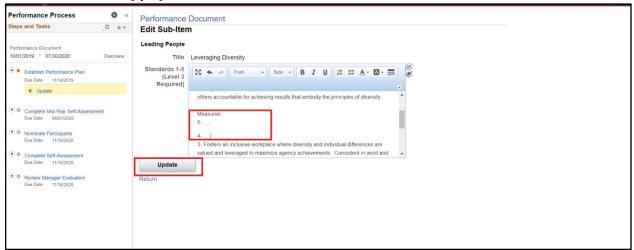


16. To edit the **Leading People** critical element or the **Leveraging Diversity** specific measure, click on the pencil icon.

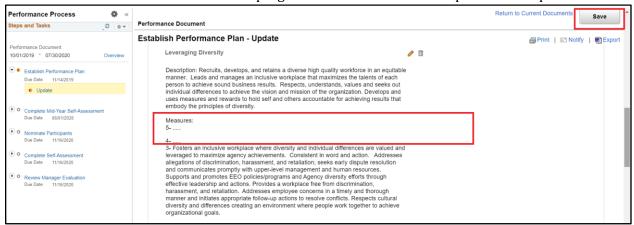




17. Edit the **Leading People** critical element or the **Leveraging Diversity** specific measure and click **Update**. *Note:* By editing the **Leveraging Diversity** specific measure you can now add other levels of performance.



18. Choose the **Save** button at the top right of the screen to save the performance plan.



19. Choose the **Save** button at the top right of the screen to save the performance plan. **You** have successfully added the mandatory Leading People Critical Element and Leveraging Diversity Specific Measure to the performance plan.



Clone prior performance plan without Leading People critical element

1. Select the **Team Performance** tile on the Manager Self Service homepage.





2. From the **Current Documents** screen, select the **Create Documents** button.



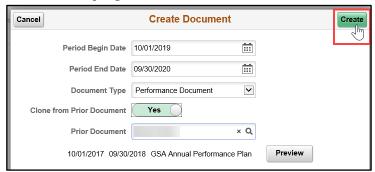
3. A **Person Selector** dialogue box will appear. Select the employee for whom you would like to create the performance plan, and select the **Continue** button.



- 4. In the *Create Documents* dialogue box, enter or click the calendar icon to select the **Period Begin Date** and the **Period End Date** for the performance document.
- 5. Choose **Performance Document** from the *Document Type* drop-down menu.
- 6. Select **Yes** from the *Clone from Prior Document* field to create a new performance plan that does **not** already include the Leading People critical element.



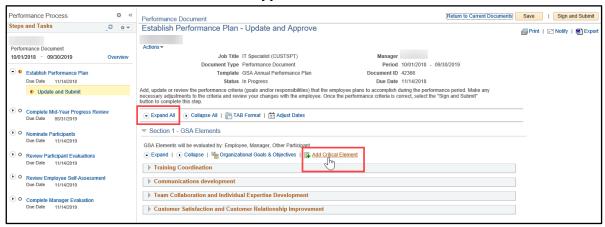
7. Select the magnifying glass to the right of the *Prior Document* field, and choose the past performance plan you would like to clone from those listed. The employee's name will populate the **Prior Document** field, and details of the plan will appear just below. Select the **Create** button at the top right to continue.



8. The newly created performance document will appear. Select the document to open and edit it.

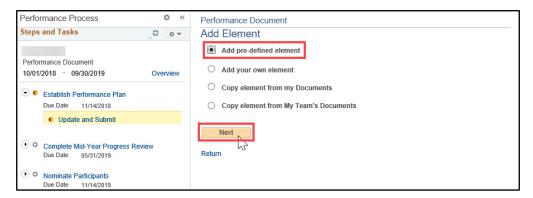


- 9. On the *Establish Performance Plan* page, select the **Expand All** option to review all sections of the performance plan.
- 10. Choose the **Add Critical Element** hyperlink under the GSA Elements section.

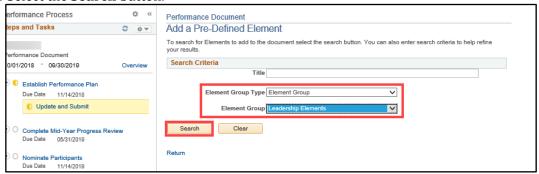


11. Choose the **Add pre-defined element** radio button, and select the **Next** button.

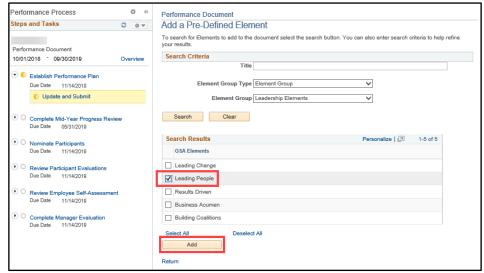




- 12. On the **Add a Pre-Defined Element** screen, choose **Element Group** from the Element Group Type drop-down menu and **Leadership Elements** from the Element Group drop-down menu.
- 13. Select the **Search** button.

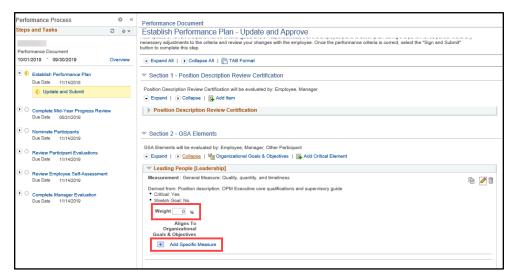


14. From the Search Results, select the checkbox by **Leading People**, and choose the **Add** button to continue.

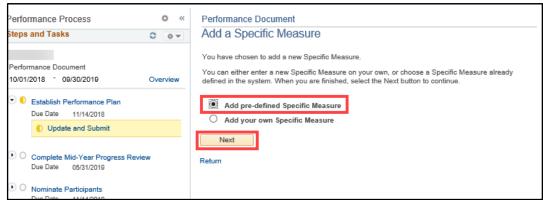


- 15. Under the Leading People [Leadership] section, indicate the percentage this specific measure will be weighted in the **Weight** field.
- 16. Select the **Add Specific Measure** hyperlink.

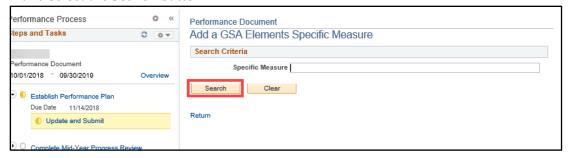




17. On the Add a Specific Measure screen, select the radio button **Add pre-defined Specific Measure**, and choose the **Next** button.

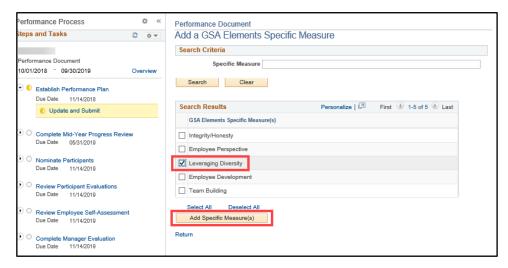


18. On the Add a GSA Elements Specific Measure screen, leave the Specific Measure field blank, and select the **Search** button.



19. From the Search Results, select the checkbox by **Leveraging Diversity**, and choose the **Add Specific Measure(s)** button to continue.



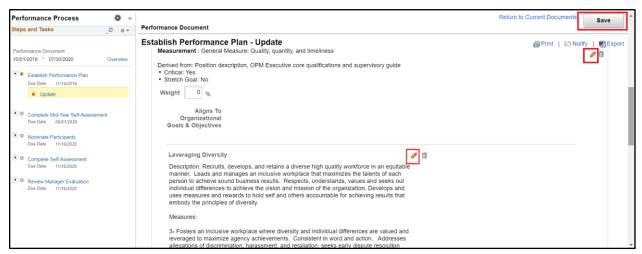


20. The Leveraging Diversity specific measure will appear under the Leading People [Leadership] section.

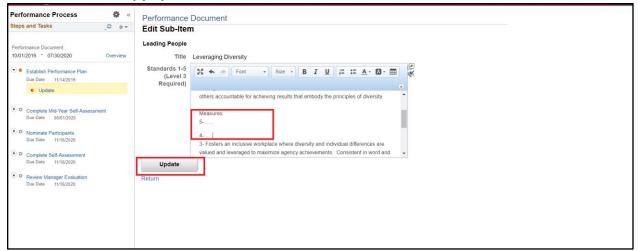


21. To edit the **Leading People** critical element or the **Leveraging Diversity** specific measure, click on the pencil icon.

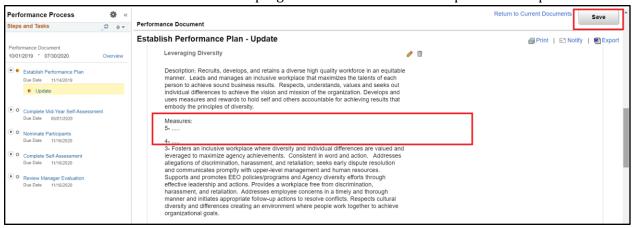




22. Edit the **Leading People** critical element or the **Leveraging Diversity** specific measure and click **Update**. *Note:* By editing the **Leveraging Diversity** specific measure you can now add other levels of performance.



23. Choose the **Save** button at the top right of the screen to save the performance plan.





24. Choose the **Save** button at the top right of the screen to save the performance plan. **You** have successfully added the mandatory Leading People Critical Element and Leveraging Diversity Specific Measure to the performance plan.

